### Instruction Guide

**Reporting in myTraining**

<table>
<thead>
<tr>
<th>Run a report showing who has and has not completed a training</th>
<th>Enterprise Reporting Tool</th>
<th>myTraining Reporting Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run a report by department(s)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Run a report by individual UFID</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Run a report to show completions outside of your department or for all of UF</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Schedule reports to be delivered via email</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Show completion data for anyone who has completed training</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Show completion data for active UF employees ONLY</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

If it is determined that you need to use the Enterprise Reporting Tool, click [here](#) for the appropriate instruction guide.

The myTraining Management System has an integrated reporting tool that will allow users with reporting credentials to view detailed training data. This instruction guide will show you how to access specific reports that will display the required training information and how to filter these reports so that you only see the data you seek.
Instruction Guide
Reporting in myTraining

Items Covered: Click on any of the links below to move to that section of this instruction guide.

1. Accessing Advanced Reporting
2. Accessing the Repository
3. Course Report by Department
4. Individual Training Record Report
5. Limitations of the myTraining Reporting Tool and Enterprise Reporting for Student Records
6. Reporting Security Roles
7. Pro3 Series Quick and Easy Guide
8. Managing at UF: The Supervisory Challenge Course Guide
Accessing Advanced Reporting
In order to view and run reports, users must first log into myTraining with their GatorLink credentials.

1. Upon logging into myTraining, hover your cursor over Reporting and click Dashboard.

**NOTE:** Users **must** access myTraining using either Internet Explorer (Windows) or Safari (Mac). It is recommended that users frequently clear browsing data (cache and cookies) when using Advanced Reporting or myTraining.
Accessing the Repository
In order to gain access to the reports created for UF employee training data, users must access the Repository. Accessing the reports in this manner will take you to the folder that houses only the reports demonstrated for you in this guide.

2. Upon opening the reporting Dashboard, hover over View and click Repository.

3. When in the Repository, you will see the Folders menu. Expand the folders in the following progression to access the given reports:

   \textit{ufshands} \rightarrow \textit{Custom} \rightarrow \textit{UF} \rightarrow \textit{Public Reports} \rightarrow \textit{Reports}
NOTE: Depending on your security access in myTraining, your view may be slightly different. However, the above folder progression is how you will access general reports. These reports have been created by T&OD and deliver standard training information similar to what is supplied by Enterprise Reporting. **However, the data retrieved from these myTraining reports is driven by your HRMS Department Security.** If you have questions about your level of HRMS Department Security, please contact your [Department Security Administrator](mailto:).  

Within the Reports folder you will see several reports. The following two reports are the most frequently utilized reports:

- Course Report by Department Report  
- Individual Training Record Report  

See the image below for further clarification.

![Repository](image-url)
Course Report by Department

The Course Report by Department allows you to see which individuals within your department have completed a specific course.

1. Click on the report titled Course Report by Department.

![Repository](image)

The Course Report by Department is driven by the Course Code paired with the Department ID. By entering these two filters you can produce a summary of the appropriate individuals.

2. Click on the Input Controls icon. See image below for additional clarification.

![Sumtotal](image)

3. In the Code starts with field, you should enter the first two numbers of your Department ID or your complete Department ID, preceded by UF_.

**Example:** UF_62 will provide data on all Department IDs that begin with 62, which happens to be Human Resources. For a listing of Department IDs click here.
4. In the **Activity Code contains** field, you should enter the course code for the report you want to run.

   **Example:** GET021 is the course code for Ages & Stages: Generations. See the image below for further clarification.

5. In the **Attempt End Date is on or after** field, you should select the appropriate date for your reporting needs, by clicking on the calendar icon.
6. Click **Apply**.
7. Once the report has finished loading, click **OK**.

See Image below for additional clarification.
The **Course Report by Department** will deliver the following information:

- Department ID
- Department
- UFID
- Name (learner)
- Start Date (course)
- End Date (course)
- Attendance Status
- Pass/Fail
- Expiration Date (where applicable)

8. If you would like to modify the parameters of the report (Department ID & Course Code), you must reopen the **Input Controls** menu. Do this by clicking the icon at the top right of the report window. See the image below.

9. You may filter any of the columns of the report by clicking the column title and selecting the **Column Filters icon**, as seen in the images below.
10. The report displays in the myTraining page. If you would like to export this report to a PDF, Excel or another file type, you must click the export button as seen in the image below.

![Image of export button]

11. Choose the file type you would like to export and it will be produced either in a new tab or as a separate file, depending on your selection. Follow the browser prompts as appropriate and save your report.

Note: Do not use the Save As button. Extraneous reports in the reporting folder will be deleted on a weekly basis. Please use the export button instead.
Individual Training Record Report
1. Navigate to the Individual Training Record Report by accessing Repository, as shown in the beginning of this guide, and select the Individual Training Record Report link.

2. The Individual Training Record Report is driven by the UFID or Distinct Full name of the individual whose training record is needed.

3. Click on the Input Controls icon. See image below for additional clarification.

4. In the field labeled User Number starts with, enter the UFID of the individual for whom you wish to see a training record.

   Or you may search by the full name of the individual in the Distinct Full Name contains field.
If searching by Distinct Full Name, use the following format:
Last name > comma > space > FirstName (EXAMPLE: Smith, John)

5. Click **Apply**.
6. Then click **OK**.
Limitations of the myTraining Reporting Tool and Enterprise Reporting for Student Records

<table>
<thead>
<tr>
<th>Enterprise Reporting Tool</th>
<th>myTraining Reporting Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run a report to get completion data for students who are actively paid by UF (in OPS positions)</td>
<td>✓</td>
</tr>
<tr>
<td>Run a report to get completion data for students who have typical UF student affiliations</td>
<td>✓</td>
</tr>
</tbody>
</table>

The Enterprise Reporting tool will not show data for any student with a typical student affiliation.

When you are running a report in the myTraining reporting tool, you will not see results for a student unless the student has a directory affiliation with the department that you have access to.

For example: Dr. Langley works in the College of Dentistry and would like to see training completion reports for Anna Student. Anna Student has a typical student affiliation in the directory and is not actively paid by UF. Her training completions will not show up in the myTraining Reporting tool.

Dr. Langley will be able to see Anna Student’s training report if:

- A person in the College of Dentistry manually gives Anna Student a directory affiliation with the College of Dentistry Department ID (as a department associate or consultant staff)

  AND

- Dr. Langley, who is running the report, has the qualifying association with the College of Dentistry, which gives him the ability to see the College’s completions
This report will deliver the following data as it pertains to the Individual:

- Course
- Type
- Description
- Start Date
- End Date
- Attendance Status
- Pass/Fail
- Expiration Date (where applicable)

7. In order to modify the UFID or Distinct Full Name, you must click the Input Controls button at the top right of the report window.

8. You may filter any of the columns of the report by clicking the column title and selecting the Column Filters icon, as seen in the image below.
9. The report displays in the myTraining page. If you would like to export this report to a PDF, Excel or another file type, you must click the export button as seen in the image below.

![Export button example](image.png)

10. Choose the file type you would like to export and it will be produced either in a new tab or as a separate file, depending on your selection. Follow the browser prompts as appropriate and save your report.

*Note: Do not use the Save As button. Extraneous reports in the reporting folder will be deleted on a weekly basis. Please use the export button instead.*
Reporting Security Roles
In order to access reports in myTraining, you will need to request the proper security role from your DSA. For information on security roles and to determine what role you might need, please visit the Training & Development Roles section of the UF Identity & Access Management website.

Additional Resources
Click on the links below for information about requirements for each program:

- Pro3 Series Quick and Easy Guide
- Managing at UF: The Supervisory Challenge Course Guide

Questions? Call Training and Organizational Development at 352-392-4626 or email at training@ufl.edu.